Slide 1

Aim – provide insight into how one trade association did it and to give guidance and tips

Key Points –
- Learn **why** should be doing it
- Things to consider
- What can expect to get from doing it
- Learn from our **mistakes**

Why me?
- Chartered Marketer with +15 years' experience
- Focus on digital and problem solving in the FIA – improving effectiveness and efficiency
- Bringing commercial focus to organisation – just cos not for profit shouldn't NOT think commercially
- Measuring marketing success

Slide 2

What did we do and why?
- 5 years ago…
  A **database** (Integra) but only member details in it and not fit for purpose
  No **ESP**
  An ecommerce **website**
  No data export from website
  No thought given to how to **use the data**

Slide 3

- **Now**
  A CRM system (Microsoft Dynamics)
  An ESP (dotMailer)
  A website connected to the CRM (although building new one)

How did we do this?
- Slow process
- **Business proposals** and justifications to the Board of the **benefit to the business** (not just to you)

1. Exported data into Excel spreadsheet - 7,000 contacts

2. Emailed audience sectors via Outlook – black labelled

3. Business proposal - new CRM system

4. Business proposal - dotMailer as ESP

5. Website now six years old

6. Business proposal: new site

Slide 4

Why?
- Why did we and why should you?

To have:
- details of all customers and prospects **in one place**
- improve the **customer experience**
- **understand our customer** groups better (not just members)

- Have we achieved this?
  Yes, but not without issue

- How long did it take?
  2-3 years to **convince** stakeholders, **research** systems, **learn** how to do it, make **mistakes**, **implement**

Benefits?

- Customer data in **one place**
  secure and safe (Data Protection Act)

- Build **complete picture** of customers (what bought, what clicked, likes etc.)

- **Target communications** to customer's preferences and personalise customer experience

Slide 5

Things to consider
- What are your **objectives**?
  Be clear about benefits to the business and to the customer

- Check system **compatibility**
  Can the ESP connect to the CRM? …

- Where will your data be **stored**? CRM or website CMS?
  Recommend CRM

- **Touch points** between the systems?
  (especially the CRM and website)
  CRM - website – CRM - ESP

- Plan for the future
  Try and **future-proof** where possible

Slide 6

Outcomes
- Create dynamic content in emails – better segmentation
- Frequency of emails can be tailored
- Ability to cross-sell and up-sell
- Website experience can be personalised via content tagged to customer's preferences

Lessons Learnt
- It's like solving a **jigsaw** puzzle

- **Patience** is required

- Don't have to be **technical** but need basic understanding

- Have **one PM** with support team
  Complex to manage with multiple agencies

- Have **clear responsibilities** between agencies

  Don't let anything slip between the stools

- **Budget** not just for the initial development but on-going

  (and include a **contingency**)

- Accept it won't always go smoothly, no matter what... FIA example

- And finally...feel the fear and do it anyway